



REQUEST FOR COPY OF PERSONAL INCOME TAX OR FIDUCIARY RETURN

Please see other side of this form to request Bank & Corporation (100, 100S, 100WE or 199), Partnership (565) or Limited Liability Company (568) Returns.

NAME AND ADDRESS PHOTOCOPIES ARE TO BE MAILED TO		NAME AND ADDRESS OF TAXPAYER(S) AS SHOWN ON TAX RETURN/CLAIM	
TAX RETURN REQUESTED (Check box)		TAX YEAR(S)	SOCIAL SECURITY NUMBER(S) (If Joint return enter spouse's SSN below)
<input type="checkbox"/> 540 <input type="checkbox"/> 540A <input type="checkbox"/> 540EZ <input type="checkbox"/> 540ADS or <input type="checkbox"/> 540NR PIT Return			
<input type="checkbox"/> 541 — Fiduciary Income Tax Return			SPOUSE'S SSN
SIGNATURE OF TAXPAYER		TYPE OR PRINT NAME	DATE
SIGNATURE OF SPOUSE			
DAYTIME TELEPHONE NUMBER ()			

Tax returns are available ONLY for the last 3 years.

You must sign this request. Without proper authorization, we will be unable to provide you with the requested copies. If you are not the taxpayer, you must provide appropriate authorization to receive copies of tax returns or claims. Appropriate authorization includes one of the following:

- A letter signed by the taxpayer authorizing Franchise Tax Board (FTB) to release the requested material to you;
- A Power of Attorney (FTB 3520) currently in effect;
- An Internal Revenue Service (IRS) Power of Attorney stating that it applies to FTB (above limitations still apply);
- Form FTB 3516 signed by the taxpayer;
- In the case of a deceased taxpayer, a certified copy of the letters of administration or testamentary, dated within the past 12 months. If the letters are more than 12 months old, a clerk of the court must recertify them stating they are still in effect.

OR

OR

OR

OR

If a bankruptcy is involved and you are not the taxpayer, you must:

- Provide court documents appointing you as trustee;
- Provide a letter signed by the trustee authorizing you to receive this material and a copy of the court documents appointing the trustee;
- Provide appropriate authorization.

OR

OR

There is no charge for a copy of your personal income tax return if the tax year requested meets the following criteria:

- The copy of the return is requested during or after an audit or collection activity related to an audit.
- You have been a victim of a designated California state or federal disaster.

If you do not meet either of the above criteria, send a check payable to the Franchise Tax Board for \$10.00 for each tax year requested.

**Mail your request to:
Franchise Tax Board
RID Unit
PO Box 942867
Sacramento CA 94267-0001
For additional information call (916) 845-5375.**



NAME AND ADDRESS PHOTOCOPIES ARE TO BE MAILED TO

NAME AND ADDRESS OF TAXPAYER(S) AS SHOWN ON TAX RETURN/CLAIM

TAX RETURN REQUESTED <i>(Check box)</i>	TAXABLE OR INCOME YEAR(S)	CALIFORNIA SECRETARY OF STATE NUMBER	FEDERAL EMPLOYER IDENTIFICATION NUMBER
<input type="checkbox"/> 100 — Corporation Return			
<input type="checkbox"/> 100WE — Water's Edge Corporation Return			
<input type="checkbox"/> 100S — S Corporation Return			
<input type="checkbox"/> 199 — Exempt Organization Return			
<input type="checkbox"/> 565 — Partnership Return			
<input type="checkbox"/> 568 — Limited Liability Company Return			

I declare under penalty of perjury, I am a current authorized representative for the above taxpayer.		
SIGNATURE AND TITLE OF OFFICER OR TRUSTEE DAYTIME TELEPHONE NUMBER ()	TYPE OR PRINT NAME 	DATE

If a suspended corporation is involved, any amounts owed must be paid prior to disclosure of the requested information. To determine the amounts owed call one of the following numbers: from within the United States, (800) 852-5711; from outside the United States (not toll-free), (916) 845-6500; or for the hearing impaired (800) 822-6268.

- Provide court documents appointing you as trustee;

OR

- Provide a letter signed by the trustee authorizing you to receive this material and a copy of the court documents appointing the trustee;

OR

- Provide appropriate authorization.

**Mail your request to:
Franchise Tax Board
RID Unit Corp
PO Box 942857
Sacramento CA 94257-0560**

For additional information call (916) 845-5375.